

# Education Interim Committee Utah Legislature

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# Overview

- Site-based budgeting in SFUSD
- Motivation for moving to site-based budgeting?
- Steps in the transition to site-based budgeting
- Annual cycle for schools now
- Training for school sites
- Outcomes to date

# San Francisco Unified School District

- 55,000 students
- 104 schools
- \$510 million Annual Operating Budget

# Motivation for moving to site-based budgeting

- Parental and staff participation in decision-making was limited
- Site plans were of uneven quality, and schools viewed them as a chore but not a useful tool
- School site councils advised the principal on the use of state and federal funds, but had no say in the use of unrestricted funds
- Most resources that schools received were given through staffing ratios, through which schools were told how many of each type of staff they would receive, based solely on numbers of students

# Site-Based Budgeting Goals

- Provide more flexibility to local schools to fit unique objectives, circumstances, strengths, weaknesses, and strategies
- Build authentic participation of school community stakeholders
- Coordinate, simplify, and improve local school planning process and make site plan more helpful
- Build a facilitative relationship between central offices and sites

# Other Important Considerations

- Site-based budgeting is part of a set of reforms – not a silver bullet
- Changes to school budgets – reductions or increases – are no longer uniform but are decisions of individual school sites



# Considerations in Designing Methodology

- What resources and responsibilities should be a site-based responsibility vs. a centrally budgeted and administered responsibility?
- How should schools and programs of various sizes be impacted and/or accommodated?
- How can we be sure that site-based committees are ready to take on this responsibility?

# Site based budgeting in SFUSD

- School Site Councils develop academic plans, budgets and staffing plans tailored to their school's specific academic needs
- School Site Councils have discretion over the unrestricted general funds as well as state categorical funds provided for the school
- The Central Office trains, assists, and monitors School Site Councils in their work
- A Weighted Student Formula is used to distribute unrestricted resources to schools based on individual students' attributes
- Money follows each student to his/her school, and each school's budget is expressed in dollars instead of positions



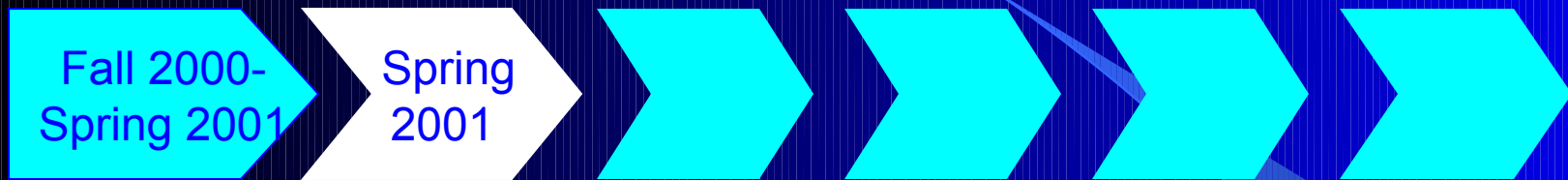
# SFUSD Timeline

Fall 2000-  
Spring 2001



- Superintendent introduces the initiative
- Multi-stakeholder Committee formed to make recommendations to the Superintendent on details

# SFUSD Timeline



- 27 schools volunteer to pilot the Initiative
  - Each pilot school was given \$100 per student. They used site data to determine how it should be spent to best benefit the students..
- Training for School Site Councils (including principals) and central offices begins

# SFUSD Timeline



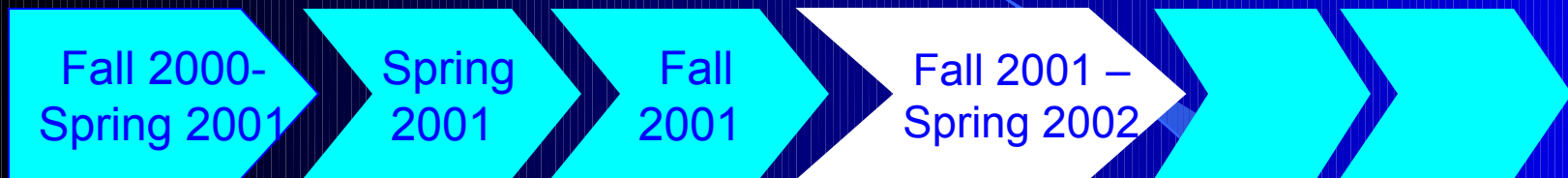
- Training for all schools (pilot and non-pilot) takes place
- Stakeholder committee hears feedback from pilot schools and makes recommendations to the Superintendent on details of the policy

# SFUSD Timeline



- Board of Education holds public meetings to explain the change and receive input
- Board of Education adopts site-based budgeting as new policy for the district

# SFUSD Timeline



- All school site teams receive training
- Schools receive data and budget allocations specific to their site and are asked to prepare a site plan and budget for school year 2002-2003

# SFUSD Timeline



- Annually stakeholder committee meets to refine assumptions and identify areas of needed improvement
- School site councils meet to develop, monitor and adjust site budgets several times throughout the year



# Annual Cycle for Schools

## Spring

- School sites receive budget allocations and guidance from central offices
- Sites hold community meetings to gather input on school site plan and budget
- School sites develop and submit site plans and budgets
- Central offices review and approve plans
- Human Resources implements staffing decisions

## Fall

- Budget allocations are adjusted to match actual enrollment
- School sites implement the plan

# Training School Site Councils (SSC)

- Training Topics

- Recruiting and electing your SSC properly
- Building and engaging your SSC
- Shared decision-making and meeting management
- Interpreting achievement data
- Writing, monitoring academic plans and budgets
- Involving the broader school community

# Training School Site Councils

- Training Forums
  - School Site Council Summits each fall
  - Professional Development Institute sessions
  - Annual spring training on academic planning and budgeting
- Written Tools
  - School Site Council Handbook
  - Local School Plan Development and Site-Based Budgeting Guide
  - Model documents from schools across the District

# Outcomes: Positive Trends

- Higher quality site plans and more effective planning and monitoring
- School Site Councils working more effectively
- Parents and teachers more engaged in academic planning
- Increased involvement and support from Assistant Superintendents
- Central offices working together for sites

## Outcomes: Meaningful Academic Plans

- Funds are used for a variety of activities to support student achievement
- Budgets are more closely aligned to identified student needs
- Plans are linked to principals' evaluation and District instructional strategies

# Outcomes: Areas for Future Work

- Provide SSC training that is more flexible and tailored to current needs
- Help SSC's share information with each other
- Continue to improve central office support and communication
- If funding improves, revisit budgeting details based on research and current information about other districts